

**Section A**  
**GENERAL TRANSACTIONS**

**Exhibit 2-A-1, Continued**

**ACIP STANDARD TABLE**

NUMBER OF YEARS AVIATION SERVICE*	OPFLY Time	ACIP STATUS**	NOTES						
Under 12 years	No minimum	Continuous	No minimum flight hour requirements necessary to qualify for ACIP						
12 (Gate I)	Less than 8 years #	Monthly	Required to fly minimum hours each month to qualify for monthly ACIP. See CG Pay Manual, Chapter 5, for flying hour requirements. <table><tr><th>IF AN AVIATOR</th><th>THEN SUBMIT</th></tr><tr><td>fails to qualify</td><td>transaction to stop ACIP</td></tr><tr><td>later qualifies</td><td>transaction to start ACIP</td></tr></table>	IF AN AVIATOR	THEN SUBMIT	fails to qualify	transaction to stop ACIP	later qualifies	transaction to start ACIP
IF AN AVIATOR	THEN SUBMIT								
fails to qualify	transaction to stop ACIP								
later qualifies	transaction to start ACIP								
12 (Gate I)	8 years minimum #	Continuous	No minimum flight hour requirements necessary to qualify for ACIP						
18 (Gate II)	Less than 10 years	Monthly	Required to fly minimum hours each month to qualify for monthly ACIP. See CG Pay Manual, Chapter 5, for flying hour requirements. <table><tr><th>IF AN AVIATOR</th><th>THEN SUBMIT</th></tr><tr><td>fails to qualify</td><td>transaction to stop ACIP</td></tr><tr><td>later qualifies</td><td>transaction to start ACIP</td></tr></table>	IF AN AVIATOR	THEN SUBMIT	fails to qualify	transaction to stop ACIP	later qualifies	transaction to start ACIP
IF AN AVIATOR	THEN SUBMIT								
fails to qualify	transaction to stop ACIP								
later qualifies	transaction to start ACIP								
18 (Gate II)	10 years minimum, but less than 12	Continuous or Monthly	Continuous ACIP to 22 years of aviation service as an officer, then monthly.						
18 (Gate II)	12 years minimum	Continuous	Continuous ACIP to 25 years of aviation service as an officer, then monthly.						

\* Years aviation service is based on Aviation Service Entry Date (ASED).

\*\* Flight surgeons and medical officers never have continuous ACIP status; their ACIP status is always a monthly entitlement.

# Was 9 years, changed by Public Law 104-106 effective 10 Feb 96.

## Agree to Extend Enlistment (P154 and CG-3301B)

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<b>Purpose</b>	This transaction is used for Acceptance of Agreement to Voluntarily Extend Enlistment.
<b>Reference</b>	<ul style="list-style-type: none"><li>• CG Personnel Manual, COMDTINST M1000.6A, Chapter 1.G.14 Through 1.G.19.</li><li>• Personnel and Pay Procedures Manual, HRSICINST M1000.2A, Chapter 3-C</li><li>• Reenlistment Bonus Programs Administration, COMDTINST 7220.33</li></ul>
<b>Transaction Built in SDA II</b>	Agree To Extend Enlistment
<b>PMIS Transaction</b>	P154 and CG-3301B (Agreement to Extend Enlistment)
<b>Policies and Procedures</b>	<p>Information you need to know about this transaction::</p> <ul style="list-style-type: none"><li>• This transaction is <u>completed</u> in SDA II upon receipt of the Career Intentions Worksheet (CG HRSIC-2045) with both the member and command approval signatures. However, this transaction should not be <u>approved</u> in SDA II until the PERSRU receives the signed Agreement to Extend Enlistment (CG-3301B).</li><li>• The effective date for regular extensions will be the date the CG-3301B is signed by the member and person witnessing the oath. For prior service OCS candidates who must extend to meet obligated service requirements, the effective date of this transaction will be the same as the Enlistment Date on the Enlistment Contract transaction. In this case the effective time of the P154 transaction must be at least five minutes prior to the effective time of the initial Reporting Endorsement transaction.</li><li>• A Begin Extension transaction (P198) must be submitted and approved in SDA II on the day the extension <b>begins</b>. The effective date must be on or prior to date of current enlistment expires.</li><li>• If this transaction is being submitted following a member's Voluntary/Involuntary Retention transaction (P176), then this transaction (P154) and the Begin Extension transaction (P198) shall have the same effective date.</li><li>• The Agree to Extend Enlistment transaction is used for both first extension of enlistment or re-extensions of enlistment. When the "Number of Extension This Enlistment" Field is 1, a P154 is built. When the "Number of Extension This Enlistment" Field is other than "1", then a P159 is built.</li></ul>

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*Continued on next page*

## Agree to Extend Enlistment (P154 and CG-3301B), Continued

### Policies and Procedures, Continued

Information you need to know about this transaction, continued:

- If an Agreement to Extend Enlistment (CG-3301B) is **canceled** per chapter 1.G.19 of the CG Personnel Manual, COMDTINST M1000.6 (series) **do not delete the P154 transaction**. Use the Cancellation of Voluntary Extension/Re-extension transaction (P187) for this purpose.

#### Extension Code

A  
B  
C  
D  
E  
F  
G  
H

#### Explanation

Request of Individual  
School/Training requirements  
Participation in Tuition Assistance Program  
Duty in/out CONUS  
Obligated Service for Advancement  
Obligated Service for Retirement  
Completion of Cruise Aboard Vessel  
Authorized by CGPC (epm)

### Fast Path ID and Data Entry

If not creating this transaction in an event, enter “expextag” for Fast Path ID or press “AEA” from the Main Menu Screen in SDA II. Enter the member’s SSN or last name and press ‘GO’. Then press ‘GO’ again. Now begin entering information to extend enlistment.

## This transaction is used for the First Acceptance to Voluntarily Extend Enlistment (First Extension of Current Enlistment)

Acceptance of Agreement to Extend/Re-extend Enlistment (Screen 1 of 2)		
<u>000-00-0000</u>	<u>BM1</u>	<u>DOE, JOHN</u>
Effective Date: <u>10/08/1997</u>	Effective Time: <u>0001</u>	Entry Type:
Number of Extension This Enlistment:	<u>1</u>	
Extension Reason Code:	<u>A</u>	(Element Code 14)
Reason for Extension:	Request of Individual	
Number of Months Extended:	<u>24</u>	(Element Code 11)
Total Months Enlistment Extended:	<u>24</u>	
Date Current Enlistment Expires:	<u>12/01/1997</u>	
New Expiration of Enlistment:	<u>12/01/1999</u>	(Element Code 12)
Name of Person Witnessing Oath:	<u>J. D. SMITH, LT, USCG</u>	
Grade/Title of Person Witnessing Oath:	<u>ADMIN OFFICER</u>	

*Continued on next page*

**Section A**  
**GENERAL TRANSACTIONS**

**Agree to Extend Enlistment (P154 and CG-3301B), Continued**

**Fast Path ID  
and Data  
Entry,  
Continued**

Field	Action
Effective Date	Enter date of acceptance.
Effective Time	Enter effective time of transaction.
Number of Extension This Enlistment	1 creates a P154, 2 or more extensions creates a P159.
Extension Reason Code	Enter the extension reason code.
Reason for Code	SDA II will automatically complete this field when the above information is provided
Number of Months Extended	Enter the number of months extended (must be less than 73).
Total Months Enlistment Extended	Enter the total months extended (must be less than 73).
Date Current Enlistment Expires	Enter the date the current enlistment expires
New Expiration of Enlistment	SDA II will automatically complete this field when the above information is provided.
Name of Person Witnessing Oath	Enter the name of the person witnessing the oath.
Grade/Title of Person Witnessing Oath	Enter the grade/title of the person witnessing the oath.

Acceptance of Agreement to Extend/Re-extend Enlistment (Screen 2 of 2)

000-00-0000

BM1

DOE, JOHN

**SRB Eligibility Acknowledgment**

Zone: B

Multiple: 1

ALCOAST: 189/00

Maximum SRB: 45000

Months Newly Obligated: 24

**Note: Complete this section even if the member is not entitled to a reenlistment bonus.**

Field	Action
Zone	Enter A, B, C or NA.
Multiple	Enter the SRB multiple under the above zone (0, 1, 1.5, 2 etc.).
ALDIST	Enter the number of the SRB ALCOAST.
Maximum SRB	Enter the maximum SRB amount authorized by the SRB ALCOAST.
Months Newly Obligated	Enter the number of months the SRB computation is based on.

*Continued on next page*

## Agree to Extend Enlistment (P154 and CG-3301B), Continued

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**PMIS/JUMPS  
Effect**

The Agreement to Extend Enlistment transaction updates the following in PMIS/JUMPS:

- Segment 00 (Expected Active Duty Termination Date **for regular active duty members and expected loss date for reserve members and regular active duty members who have already met their 8 year military obligation.**)
- Segment 75 (Separation/Retention information)
- Updates page 5 (Contract and Service information) of the PMIS screens in the PMIS Data Base.

**Note:** If reserve members on active duty (greater than 140 days) being paid by PMIS/JUMPS receive new or amended orders further extending the active duty period, see the P191 and P192 transaction. The P159 transaction alone will not continue the reserve members active duty pay.

**Corrections  
and Deletions**

Corrections and Deletions may be made to this transaction and are done in Transaction Review of the SDAII system.

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## Agree to Re-extend Enlistment (P159 and CG-3301B)

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<b>Purpose</b>	This transaction is used for Acceptance of Agreement to Voluntarily Re-extend Enlistment.
<b>Reference</b>	<ul style="list-style-type: none"><li>CG Personnel Manual, COMDTINST M1000.6A, Chapter 1.G.14 Through 1.G.19.</li><li>Personnel and Pay Procedures Manual, HRSICINST M1000.2A, Chapter 3-C</li><li>Reenlistment Bonus Programs Administration, COMDTINST M7220.33</li></ul>
<b>Transaction Built in SDA II</b>	Agree To Re-extend Enlistment
<b>PMIS Transaction</b>	P159 and CG-3301B (Agreement to Extend Enlistment)
<b>Policies and Procedures</b>	<p>Information you need to know about this transaction:</p> <ul style="list-style-type: none"><li>This transaction is <u>completed</u> in SDA II upon receipt of the Career Intentions Worksheet (CG HRSIC-2045) with both the member and command approval signatures. However, this transaction should not be <u>approved</u> in SDA II until the PERSRU receives the signed Agreement to Extend Enlistment (CG-3301B).</li><li>The effective date for re-extensions will be the date the CG-3301B is signed by the member and person witnessing the oath.</li><li>A Begin Re-extension transaction (P199) must be submitted and approved in SDA II on the day the re-extension <b>begins</b>.</li><li>The Acceptance of Agreement to Extend/Re-extend Enlistment transaction is used for both first extension of enlistment or re-extension's of enlistment. When the "Number of Extension This Enlistment" Field is 1, a P154 is built. When the "Number of Extension This Enlistment" Field is other than "1", then a P159 is built.</li><li>If an Agreement to Extend Enlistment (CG-3301B) is <b>canceled</b> per chapter 1.G.19 of the CG Personnel Manual, COMDTINST M1000.6 (series) <b>do not delete the P159</b> transaction. <u>Use the Cancellation of Voluntary Extension/Re-extension transaction (P187) for this purpose.</u></li><li>If this transaction is being submitted following a member's Voluntary/Involuntary retention (after a P176 transaction), then this P159 transaction and the begin voluntary reextension transaction P199 must have the same effective date. The effective date must be prior to date current enlistment expires.</li></ul>

<u>Extension Code</u>	<u>Explanation</u>
A	Request of Individual
B	School/Training requirements
C	Participation in Tuition Assistance Program
D	Duty in/out CONUS
E	Obligated Service for Advancement
F	Obligated Service for Retirement
G	Completion of Cruise Aboard Vessel
H	Authorized by CGPC (epm)

**Section A**  
**GENERAL TRANSACTIONS**

## Agree to Re-extend Enlistment (P159 and CG-3301B), Continued

**Fast Path ID and Data Entry** If not creating this transaction in an event, enter “expextag” for Fast Path ID or press “AEA” from the Main Menu Screen in SDA II. Enter the member’s SSN or last name and press <F1>. Then press <F1> again. Now begin entering information to extend enlistment.

Acceptance of Agreement to Extend/Re-extend Enlistment (Screen 1 of 2)		
000-00-0000	ET2	SMITH, JANE
Effective Date: 10/14/1997	Effective Time: 0001	Entry Type:
Number of Extension This Enlistment:	2	
Extension Reason Code:	A	(Element Code 14)
Reason for Extension:	Request of Individual	
Number of Months Extended:	36	(Element Code 24)
Total Months Enlistment Extended:	60	(Element Code 26)
Date Current Enlistment Expires:	01/15/1998	
New Expiration of Enlistment:	01/15/2001	(Element Code 25)
Name of Person Witnessing Oath:	J. D. SMITH, LT, USCG	
Grade/Title of Person Witnessing Oath:	ADMIN OFFICER	

Field	Action
Effective Date	Enter the effective date of transaction.
Effective Time	Enter effective time of transaction.
Number of Extension This Enlistment	1 creates a P154, 2 or more creates a P159.
Extension Reason Code	Enter the extension reason code.
Number of Months Extended	Enter the number of months extended (must be less than 73).
Total Months Enlistment Extended	Enter the total months extended (must be less than 73).
Date Current Enlistment Expires	Enter data or press F4 to end.
Name of Person Witnessing Oath	Enter the name of the person witnessing the oath.
Grade/Title of Person Witnessing Oath	Enter the grade/title of the person witnessing the oath.

Acceptance of Agreement to Extend/Re-extend Enlistment (Screen 2 of 2)		
000-00-0000	ET2	SMITH, JANE
SRB Eligibility Acknowledgment		
Zone:	A	<b>Note: Complete this section even if the member is not entitled to a reenlistment bonus.</b>
Multiple:	3	
ALCOAST	189/00	
Maximum SRB:	45000	
Months Newly Obligated:	36	

Field	Action
Zone	Enter A, B, C or NA.
Multiple	Enter the SRB multiple under the above zone (0, 1, 1.5, 2 etc.).
ALCOAST	Enter the number of the SRB ALCOAST.
Maximum SRB	Enter the maximum SRB amount authorized by the SRB ALCOAST.
Months Newly Obligated	Enter number of months the SRB computation is based on.

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## Agree to Re-extend Enlistment (P159 and CG-3301B), Continued

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**PMIS/JUMPS  
Effect**

The Agreement to Re-extend Enlistment transaction updates the following in PMIS/JUMPS:

- Segment 00 (Expected Active Duty Termination Date **for regular active duty members and expected loss date for reserve members and regular active duty members who have already met their 8 year military obligation**).
- Segment 75 (Separation/Retention information)
- Updates page 5 (Contract and Service information) of the PMIS screens in the PMIS Data Base.

**Note:** If reserve members on active duty (greater than 140 days) being paid by PMIS/JUMPS receive new or amended orders further extending the active duty period, see the P191 and P192 transaction. The P159 transaction alone will not continue the reserve members active duty pay.

**Corrections  
and Deletions**

Corrections and Deletions may be made to this transaction and are done in Transaction Review of the SDAII system.

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## Begin Extension of Enlistment (P198)

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<b>Purpose</b>	This transaction is used to begin service under a voluntary extension of enlistment.
<b>Reference</b>	<ul style="list-style-type: none"><li>• Personnel and Pay Procedures Manual, HRSICINST M1000.2A, Chapter 3-C.</li><li>• CG Pay Manual, COMDTINST M7220.29 (series), Chapter 2-I and 10-A</li><li>• CG Personnel Manual, COMDTINST M1000.6 (series), Chapter 7.</li></ul>
<b>Transaction Built in SDA II</b>	Begin extension of enlistment.
<b>PMIS/JUMPS Transaction</b>	P198
<b>Policies and Procedures</b>	<p>Information you need to know about this transaction.</p> <ul style="list-style-type: none"><li>• <b>Effective Date:</b> Will be the date the voluntary extension of enlistment begins. This transaction must have been preceded by the submission of the “agree to extend enlistment (P154)” transaction. If you are submitting this transaction following a “retained beyond normal expiration of enlistment transaction (P176)”, then this “begin extension of enlistment (P198)” transaction and the “agree to extend enlistment (P154)” transaction <u>must have the same effective date</u>. This is also the same date the member becomes qualified for extension of enlistment. The effective date must be on or prior to date current enlistment expires.</li><li>• <b>New Expiration of Enlistment Date:</b> This will be the <u>new</u> expiration of enlistment date. If the member has already accepted a voluntary re-extension transaction and submitted in PMIS/JUMPS, the new expiration of enlistment date <u>will be the date the re-extension expires</u>. Also, deductible time (if any) is added to the expiration of enlistment date in determining the new expiration of enlistment.</li><li>• <b>Number of Days Excess Leave:</b> This is used to show the member is in an excess leave status. Review chapter 2-I of the CG Pay Manual if the member has excess leave when completing this portion of the transaction. If the member is in an excess leave status, it is recommended they be counseled on how excess leave debits will effect their pay.</li><li>• <b>Days of <u>Saved Leave</u> the Member Elects to Sell &amp; Days of <u>Regular Leave</u> the Member Elects to Sell:</b> Members are entitled to sell leave on their <u>first extension of the current enlistment</u>. Review chapter 10-A of the CG Pay Manual prior to completing this portion of the transaction. As a reminder, If a member sells leave in connection with their first extension, payment will be included in the end of month pay following successful processing in PMIS/JUMPS.</li></ul>
<b>Fast Path ID and Data Entry</b>	<p>If not creating this transaction in an event, enter “expextbe” for Fast Path ID or press “AEB” from the Main Menu Screen in SDA II. Enter the member’s SSN or last name and press &lt;F1&gt;. Enter a “Y” in begin service under voluntary extension of enlistment transaction. Press &lt;F1&gt; again. Now begin entering information to begin extension of enlistment.</p> <p><b>Note:</b> In the first screen you will see (above) you have the option to choose Re-extension or Extension. This transaction will be for an <u>Extension</u>.</p>

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*Continued on Next Page*

**Section A**  
**GENERAL TRANSACTIONS**

## Begin Extension of Enlistment (P198), Continued

Begin Extension of Enlistment Transaction (Screen 1 of 1)		
000-00-0000	BM1	DOE, JOHN
Stat	Options	Transactions
N		Begin Service Under Voluntary Re-extension of Enlistment?
I <u>Y</u>		Begin Service Under Voluntary Extension of Enlistment?

Field	Action
Begin Service Under Voluntary Reextension of Enlistment	Enter yes if this is a Begin Reextension.
Begin Service Under Voluntary Extension of Enlistment	Enter yes if this is a Begin Extension.

Begin Service Under Voluntary Extension of Enlistment (Screen 1 of 1)		
000-00-0000	BM1	DOE, JOHN
Date Voluntary Extension Begins: <u>12/02/1997</u>	Time: <u>0001</u>	Entry Type:
New Expiration of Enlistment Date : <u>12/01/99</u>		<b>(Element Code 01)</b>
<p><b>Note:</b> If a voluntary re-extension (P159) has been input prior to the voluntary extension begin date, then the New Expiration of Enlistment Date will be the date the re-extension ends. Also, deductible time is added to expiration of enlistment date in determining the new expiration of enlistment date.</p>		
Number of days of excess leave:	<u>0.0</u>	<b>(Element Code 05)</b>
Days of Saved Leave the member elects to sell:	<u>0.0</u>	<b>(Element Code 07)</b>
Days of Regular Leave the member elects to sell:	<u>0.0</u>	<b>(Element Code 08)</b>

Field	Action
Date Voluntary Extension Begins	Enter the date the voluntary extension begins.
Time	Enter effective time of personnel action transaction.
New Expiration of Enlistment Date	Enter the New Expiration of Enlistment Date.

**Note:** The “Agree to Extend Enlistment (P154) transaction should have been completed prior to this transaction. If it was not input into PMIS/JUMPS the following message will appear on the SDA II screen when you have finished entering the information above and press go.”

**“The system does not recognize a first extension on the mbr. Need to check AMDHAL. You might need to do a first extension on the member”**

**PMIS/JUMPS Effect**      The Begin Extension of Enlistment transaction updates the following in PMIS/JUMPS:

- Segment 62 (leave sold/carried forward)
- Segment 75 (Separation/Retention information)
- Updates page 5 (Contract and Service information) of the PMIS screens in the PMIS Data Base.

**Corrections and Deletions**      Corrections and Deletions may be made to this transaction and are done in Transaction Review of SDA II.

## Begin Re-extension of Enlistment (P199)

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<b>Purpose</b>	This transaction is used to begin service under a voluntary re-extension of enlistment.
<b>Reference</b>	<ul style="list-style-type: none"><li>• Personnel and Pay Procedures Manual, HRSICINST M1000.2A, Chapter 3-C.</li><li>• CG Pay Manual, COMDTINST M7220.29 (series), Chapter 2-I and 10-A</li><li>• CG Personnel Manual, COMDTINST M1000.6 (series), Chapter 7.</li></ul>
<b>Transaction Built in SDA II</b>	Begin re-extension of enlistment.
<b>PMIS/JUMPS Transaction</b>	P199
<b>Policies and Procedures</b>	<p>Information you need to know about this transaction.</p> <ul style="list-style-type: none"><li>• <b>Effective Date:</b> Will be the date the voluntary re-extension of enlistment begins. This transaction must have been preceded by the submission of the “agree to re-extend enlistment (P159)” transaction. If you are submitting this transaction following a “retained beyond normal expiration of enlistment transaction (P176)”, then this “begin re-extension of enlistment (P199)” transaction and the “agree to re-extend enlistment (P159)” transaction <u>must have the same effective date</u>. This is also the same date the member becomes qualified for re-extension of enlistment. The effective date must be on or prior to date current enlistment expires.</li><li>• <b>New Expiration of Enlistment Date:</b> This will be the <u>new</u> expiration of enlistment date. If the member has already accepted additional voluntary re-extension transactions and submitted in PMIS/JUMPS, the new expiration of enlistment date <u>will be the date all the re-extensions expire</u>. Also, deductible time (if any) is added to the expiration of enlistment date in determining the new expiration of enlistment.</li><li>• <b>Member is not entitled to sell any leave on a re-extension.</b></li></ul>

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## Begin Re-Extension of Enlistment (P199), Continued

### Fast Path ID and Data Entry

If not creating this transaction in an event, enter “expextbe” for Fast Path ID or press “AEB” from the Main Menu Screen in SDA II. Enter the member’s SSN or last name and press ‘GO’. Enter a “Y” in begin service under voluntary re-extension of enlistment transaction. Then press ‘GO’. Now begin entering information to begin re-extension of enlistment.

**Note:** In the first screen you will see (above) you have the option to choose Re-extension or Extension. This transaction will be for a Re-extension.

Begin Extension of Enlistment Transaction (Screen 1 of 1)		
000-00-0000	ET2	SMITH, JANE
Stat	Options	Transactions
<b>I Y</b>	Begin Service Under Voluntary Re-extension of Enlistment?	
N	Begin Service Under Voluntary Extension of Enlistment?	

Begin Service Under Voluntary Re-extension of Enlistment (Screen 1 of 1)		
000-00-0000	ET2	SMITH, JANE
Date Voluntary Re-Extension Begins: <u>01/16/1998</u> Time: <u>0001</u> Entry Type:		
New Expiration of Enlistment Date : <u>01/15/01</u> <b>(Element Code 01)</b>		
<b>Note:</b> If additional re-extensions (P159) have been input prior to this voluntary re-extension begin date, the new expiration of enlistment date will be the date all re-extensions expire. Also, deductible time is added to expiration or enlistment date in determining the new expiration of enlistment date.		

**Note:** The “Agree To Re-extend Enlistment (P159) transaction should have been completed prior to this transaction. If it was not input into PMIS/JUMPS the following message will appear on the SDA II screen when you have finished entering the information above and have pressed <go>.

**“The system does not recognize a re-extension on the member. Are you sure you want this to be a begin RE-EXTENSION? Please check AMDHAL”.**

Field	Action
Date Voluntary Re-Extension Begins	Enter the date the voluntary re-extension begins.
Time	Enter effective time of personnel action transaction.
Entry Type	This is not updateable
New Expiration of Enlistment Date	Enter the new Expiration of Enlistment date.

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## Completed School (P341)

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**Purpose** This transaction is used to add and delete school completion information for all Coast Guard members into PMIS/JUMPS.

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**Reference**

- Personnel and Pay Procedures Manual, HRSICINST M1000.2 (series), Chapter 4
- Training and Education Manual, COMDTINST M1500.10 (series)
- Personnel Manual, COMDTINST M1000.6 (series)
- Enlisted Qualifications Codes Manual, COMDTINST M1414.9 (series)
- Pay Manual, COMDTINST M7220.29 (series)

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**Transaction  
Built in SDA II** Completed School

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**PMIS  
Transaction** P341

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**Policies and  
Procedures** Information you need to know about this transaction:

- This transaction allows the user to create multiple school completion transactions on a member.
- This transaction should only be used when there is supporting documentation that shows the member completed a school.
- If there is a qualification code that corresponds with the school completion code, then a qualification code should also be entered.
- The maximum number of qualification codes a member may have is 12.
- The maximum number of school codes a member may have in the PMIS/JUMPS database is 20.

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**Fast Path ID  
and Data Entry** If not creating this transaction in an event, enter “P341” for Fast Path ID or press “BBE” from the Main Menu Screen in SDA II. Then enter the member’s SSN or last name and press <GO> or F1. The following screen should display.

School Completion Transactions (Screen 1 of 1)		
000-00-0000	SA	DOE, DONALD
Effective Date	Effective Time	Tran Status

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## Completed School (P341), Continued

### Fast Path ID and Data Entry, Continued

After the above screen appears, press <F3>. This will allow you to create a School Completion transaction. The following screen should appear after you have pressed <F3>.

School Completion (screen 1 of 1)		
000-00-0000	SA	DOE, DONALD
Effective Date: 10/21/1999	Effective Time: 0001	
School Completed: 000027	Completion Date: 10/27/1999	(Element Code 81)
Course Title: Environmental		
Delete School Code: _____	Completion Date: _____	(Element Code 80)
Course Title: _____		
New Rating/Designator Due to Advancement: ____		(Element Code 82)
Delete Qualification Code: ____		(Element Code 85)
New Qualification Code: ____		(Element Code 86)
New Qualification Date: __/__/____		(Element Code 86)

### Fields

The following is a breakdown of the fields on the School Completed (Screen 1 of 1) and the action to be taken on each field:

Field	Action
Effective Date	This is the effective date the member completed school or is advanced. <b>This field will create element code 84 if member is being advanced.</b> <b>Note: If member is not being advanced, then the effective date should be the date the document is prepared. This should be an in range date.</b>
Effective Time	Enter the effective time.
Completion Date	Enter the date the member completed school.
School Completed	Enter the six (6) digit school code the member completed. Press F2 for a list of valid school codes. <b>Note:</b> There may be school codes not listed on the help wheel (F2). This may happen when there are new school codes but the SDA II system has not been updated. Enter the new school code anyway.
Course Title	This field is not updateable. It is pre-filled when the user updates the 'School Completed' field. It is a description of the school the member completed. <b>Note:</b> There may be school codes in the system that do not have a Course Title.
Delete School Code	Enter the six (6) digit school code to be deleted.
Completion Date	Enter the completion date of the school code to be deleted.
Course Title	This field is not updateable. It is pre-filled when the user updates the 'Delete School Code' field.

## Active Duty Enlistment/Reenlistment Bonus (H600)

---

<b>Purpose</b>	This transaction is used by PERSRU's to pay enlistment/reenlistment bonuses to eligible recruits and prior service members who enlist in certain critical ratings.
<b>Reference</b>	<ul style="list-style-type: none"><li>Coast Guard Enlisted Bonus (EB) Program, COMDTINST 7220.40</li><li>Reenlistment Bonus Programs Administration, COMDTINST M7220.33</li></ul>
<b>Transaction Built in SDA II</b>	Active Duty Enlistment/Reenlistment Bonus
<b>PMIS Transaction</b>	H600
<b>Policies and Procedures</b>	<p>Information you need to know about this transaction:</p> <ul style="list-style-type: none"><li>The Coast Guard implemented policy to encourage new recruits with or without prior service to enlist in certain specialties within the Coast Guard. Members who enlisted in these specialties will be given a bonus of \$2,000. For those members with no prior service the bonus will be paid over two equal installments of \$1,000. The first half to be paid after completion of recruit training and the second half paid upon completion of Class "A" school. In the case of prior service personnel who already have the qualifying skill, members shall be paid in two equal installments of \$1,000, the initial payment made upon entry into the Coast Guard and the second payment made after satisfactorily serving for six months in the designated rating.</li></ul>
<b>Fast Path ID and Data Entry</b>	Enter "BCMA" from the Main Menu Screen in SDA II. Enter the member's SSN, last name, first name and rank (SDA II will complete the member's last name, first name and rank if he/she is already in the data base) press <F1> until the following screen 1 of 1 appears. Complete the fields.

Active Duty Enlistment/Reenlistment Bonus (Screen 1 of 1)		
000-00-0000	SA	DOE, JANE
Effective Date: <u>05/02/1997</u> Effective Time: <u>0005</u> Type entry:		
<b>Start Date of Enlistment Contract:</b>	<u>00/00/0000</u>	<b>(element code 04)</b>
Stop Date of Bonus:	<u>05/01/2002</u>	<b>(element code 01)</b>
Active Duty Base Date:	<u>05/02/1993</u>	<b>(element code 02)</b>
Object Code:	<u>12653</u>	<b>(element code 03)</b>
Dollar Amount of 1 <sup>st</sup> Installment:	<u>01000.00</u>	<b>(element code 20)</b>
Total Amount of New Bonus:	<u>02000.00</u>	<b>(element code 21)</b>
Number of Installments Payable:	<u>2</u>	<b>(element code 22)</b>

**Note:** There are two other element codes created by this transaction not shown on the above example screen 1 of 1. They are element code 23 (number of installments authorized now) and element code 98 (total dollar amount of element codes 20 and 21). To see all of the element codes on this transaction, you may print the transaction log by pressing <F6> and selecting option B.

*Continued on next page*

**Section A**  
**GENERAL TRANSACTIONS**

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## **Active Duty Enlistment/Reenlistment Bonus (H600), Continued**

**Fast Path ID  
and Data  
Entry,**

**Continued**

<b>Field</b>	<b>Action</b>
Effective Date	Enter the date the transaction is prepared.
Effective Time	Enter 0005.
Start Date of Enlistment Contract	Enter Date of Enlistment Contract
Stop Date of Bonus	Enter expiration date of applicable enlistment/reenlistment period.
Active Duty Base Date	Enter the member's active duty base date.
Object Code	Enter 12653 for a new recruit with no prior service or enter 12654 for prior service member.
Dollar amount of New Bonus	Enter the dollar amount of the first installment.
Total Amount of New Bonus	Enter the total dollar amount of the bonus.
Number of Installments Payable	Enter the number of installments payable.

When you have completed entering the information in screen 1 of 1 above press <F1>. You will return to the SDA II main menu. Your transaction is complete.

**PMIS/JUMPS  
Effect**

The Active Duty Enlistment/Reenlistment Bonus transaction updates the following in PMIS/JUMPS:

- Segment 30
- Segment 42
- There is no affect to the PMIS database.

**Corrections  
and Deletions**

Corrections and Deletions may not be made to this transaction.

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## Advance Overseas Housing Allowance (H605) Online

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<b>Purpose</b>	This transaction is used to pay a member advance Overseas Housing Allowance online through PMIS/JUMPS.
<b>Reference</b>	<ul style="list-style-type: none"><li>• Personnel and Pay Procedures Manual, HRSICINST M1000.2 (series), Chapter 6 and Enclosure (1).</li><li>• Pay Manual, COMDTINST M7220.29 (series), Chapter 9.</li></ul>
<b>Transaction Built in SDA II</b>	Advance Overseas Housing Allowance.
<b>PMIS Transaction</b>	H605
<b>Policies and Procedures</b>	Information you need to know about this transaction: <ul style="list-style-type: none"><li>• <b>Review above references</b> prior to submitting this transaction on a member. There are several important policies governing the payment of advance pay.</li></ul>
<b>Fast Path ID and Data Entry</b>	If not creating this transaction in an event, enter “MIPAADUP” for Fast Path ID or press “AJAF” from the Main Menu Screen in SDA II. Then enter the member’s SSN or last name and press <F1>. The following screen 1 of 1 will display.

Advance Payments and/or Allowances Transactions (Screen 1 of 1)		
000-00-0000		ENS STONE, JOHN
Stat	Options	Transactions
		Advance Payments
	<u>N</u>	Advance Pay
	<u>N</u>	Advance Pay and Allowances
	<u>N</u>	Advance BAH
	<u>N</u>	Advance Overseas Housing Allowance

Select a transaction type (N = Online, F = Has Been Removed; For Offline, Contact HRSIC). When the above screen appears, enter “N” on blank line beside Advance Payments. Then enter “Y” on the line beside Advance Overseas Housing Allowance. Your screen should now look as follows:

Advance Payments and/or Allowances Transactions (Screen 1 of 1)		
000-00-0000		ENS STONE, JOHN
Stat	Options	Transactions
	<u><b>Online</b></u>	Advance Payments
	<u>N</u>	Advance Pay
	<u>N</u>	Advance Pay and Allowances
	<u>N</u>	Advance BAH
	<u><b>Y</b></u>	Advance Overseas Housing Allowance

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*Continued next page*

Section A  
GENERAL TRANSACTIONS

## Advance Overseas Housing Allowance (H605) Online, Continued

**Fast Path ID  
and Data  
Entry,  
Continued**

Now Press <F1>. The following screen 1 of 1 will appear. Begin completing the fields.

Online Advance Overseas Housing Allowance (Screen 1 of 1)		
000-00-0000	ENS	STONE, JOHN
Effective Date: 12/12/1999	Effective Time: 0001	Entry Type:
Unit Location Code:	05	(Element code 30)
Amount Paid:	\$2,000.00	(Element code 40)
Monthly Installment Amount:	\$166.66	(Element code 41)
Number of Installments to Repay:	12	(Element code 42)
Date Repayment Will Begin:	01/01/2000	(Element code 43)
Date Repayment Will End:	12/31/2001	(Element code 44)
Rotation Date:	10/01/2003	(Element code 45)

**Note:** There are two other element codes created by this transaction, but are not shown on the above sample screen. They are element code 18 (Advance Overseas Housing Allowance paid through PMIS/JUMPS) and element code 98 (Total of all money amounts in element codes 40 and 41). To see all of these element codes, you may print the transaction log by pressing <F6> and selecting B.

Field	Action
Effective Date	Enter date this transaction is prepared. <b>Be alert to how the effective date corresponds to PMIS/JUMPS polling cut off dates and paydays. For example, if a member is expecting the advance OHA in their 15<sup>th</sup> of the month payday, this transaction must process prior to the PMIS/JUMPS mid month compute transmittal cutoff date. If the member is expecting the advance OHA in their 1<sup>st</sup> of the month payday, this transaction must process prior to the PMIS/JUMPS end month compute transmittal cutoff date.</b>
Effective Time	Enter the effective time.
Entry Type	This field is not updatable.
Unit Location Code	Enter unit location District number (i.e., 05, 07, 14, 17, 96).
Amount Paid	Enter the total amount of advance Overseas Housing Allowance the member is requesting.
Number of Installments to Repay	Enter the amount of months the member elects to repay the advance Overseas Housing Allowance. Normally the maximum length of time is 12 months. See the Pay Manual for exceptions.

*Continued next page*

## Advance Overseas Housing Allowance (H605) Online, Continued

**Fast Path ID  
and Data  
Entry,  
Continued**

Field	Action
Monthly Installment Amount	SDA II automatically completes this field. When SDA II calculates this amount, it uses the amount paid divided by the number of installments.
Date Repayment Will Begin	SDA II automatically completes this field. When SDA II calculates this date, it uses the effective date of the transaction.
Date Repayment Will End	SDA II automatically completes this field. When SDA II calculates this date, it uses the effective date repayment will begin and the number of installments to repay.
Rotation Date	Enter the member's rotation date from current unit.

When you have completed screen 1 of 1 above press <F1>. You will return to the SDA II main menu. Your transaction is complete.

**PMIS/JUMPS  
Effect**

The advance Overseas Housing Allowance paid through PMIS/JUMPS online transaction updates the following in PMIS/JUMPS:

- Segment 41.
- Has no effect on the PMIS screens in the PMIS data base.

**Corrections  
and Deletions**

Corrections and deletions may not be made to this transaction.

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## Change Liquidation Schedule (H605)

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<b>Purpose</b>	This transaction is used to change the advances liquidation schedule for a member.
<b>Reference</b>	<ul style="list-style-type: none"><li>• Pay Manual, COMDTINST M7220.29 (series), Chapter 3.</li><li>• Personnel and Pay Procedures Manual, HRSICINST M1000.2 (series), Chapter 6.</li></ul>
<b>Transaction Built in SDA II</b>	Change Liquidation Schedule
<b>PMIS Transaction</b>	H605
<b>Policies and Procedures</b>	<p>Information you need to know about this transaction:</p> <ul style="list-style-type: none"><li>• <b>Review the Pay Manual</b> and the Personnel and Pay Procedures Manual, prior to submitting this transaction.</li><li>• <b>This transaction can only be used for advance; Pay, BAH or OHA.</b> The member must currently have a advance being liquidated in order to submit this transaction.</li><li>• <b>If the system will not allow you to prepare this transaction,</b> send an e–mail to HRSIC (MAS), and HRSIC will change the liquidation schedule.</li></ul>
<b>Fast Path ID and Data Entry</b>	If not creating this transaction in an event, enter “PACTCHG” for Fast Path ID or press “AJD” from the Main Menu Screen in SDA II. Then enter the member’s SSN or last name and press <F1>. The following screen 1 of 1 will appear.

Change Liquidation Schedule (Screen 1 of 1)						
	000-00-0000			BMC	JACKSON, ROBERT	
Start Date	Number of Installments	Total Amount	Install Amount	Balance Amount	Effective Date	Trans Stat
06/01/1999	12	1,200.00	100.00	600.00		

When the above screen appears, highlight the correct advance the member wishes to change and press <F3>. Note: There may be more than one advance liquidating on a member. Ensure you choose the correct one. The following screen will appear.

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*Continued next page*

**Section A**  
**GENERAL TRANSACTIONS**

## Change Liquidation Schedule (H605), Continued

**Fast Path ID and  
Data Entry,  
Continued**

Once the below screen 1 of 1 appears. Begin completing the fields.

Change Liquidation Schedule (Screen 1 of 1)		
000-00-0000	BMC	JACKSON, ROBERT
Effective Date: <u>12/15/99</u>	Effective Time: <u>0001</u>	Entry Type:
Start Date of Segment to be changed: <u>06/01/1999</u>	<b>(Element code 23)</b>	
New Installment Amount Effective Date: <u>01/01/2000</u>	<b>(Element code 29)</b>	
Total Amount of Advance or Indebtedness: <u>\$1,200.00</u>	<b>(Element code 20)</b>	
Installment Code:	<b>(Element code 22)</b>	
Old Installment Amount: <u>\$100.00</u>	<b>(Element code 24)</b>	
New Installment Amount: <u>\$00.0</u>	<b>(Element code 21)</b>	

Field	Action
Effective Date	Enter the date prepared.
Effective Time	Enter the time.
Start Date of Segment to be Changed	This field is completed by SDA II. It reflects the original start date the advances liquidation began.
New Installment Amount Effective Date	Enter the first day of the month. You must pay close attention to the PMIS/JUMPS end month compute cycle dates when completing the field. For example: Since the effective date of this transaction (15 Dec) is prior to end month compute December 1999, the correct date to enter in this field will be 1 January 2000. However, if the effective date of this transaction were 28 December 1999 (past Dec 99 end month compute cycle) then the correct effective date to be entered would be 1 February 2000.

Press <F1>. SDA II will verify how much of the advance the member has left to repay. **Press space bar to continue.**

Change Liquidation Schedule (Screen 1 of 1)		
000-00-0000	BMC	JACKSON, ROBERT
Effective Date: <u>12/15/99</u>	Effective Time: <u>0001</u>	Entry Type:
Start Date of Segment to be changed: <u>06/01/1999</u>		
New Installment Amount Effective Date: <u>01/01/2000</u>		
Total Amount of Advance or Indebtedness: <u>\$500.00</u>		
Installment Code:		
Old Installment Amount: <u>\$100.00</u>		
New Installment Amount: <u>\$00.0</u>		

*Continued next page*

**Section A**  
**GENERAL TRANSACTIONS**

## Change Liquidation Schedule (H605), Continued

**Fast Path ID  
and Data  
Entry,  
Continued**

Field	Action
Total amount of Advance of Indebtedness	SDA II will automatically change this field from the original amount of debt <u>to the amount currently owed</u> . See above screen.
Installment Code	Enter the new installment amount in number of months or enter LS for Lump Sum. The total previous and new repayment schedule can not exceed 24 months. When you have completed this field <b>press &lt;F6&gt; and option B to print transaction log</b> . The new installment amount will automatically change.
Old Installment amount	This field is completed by SDA II. It reflects the original repayment installment amount of the advance payment.
New Installment Amount	This field is completed by SDA II when <F6> is pressed as indicated above in "Installment Code" field.

**Note:** Once you have printed the transaction log, your screen 1 of 1 will change to show the total amount of advance or indebtedness remaining, new installment code amount, and new installment amount.

Change Liquidation Schedule (Screen 1 of 1)		
000-00-0000	BMC	JACKSON, ROBERT
Effective Date: <u>12/15/99</u>	Effective Time: <u>0001</u>	Entry Type:
Start Date of Segment to be changed: <u>06/01/1999</u>		
New Installment Amount Effective Date: <u>01/01/2000</u>		
Total Amount of Advance or Indebtedness: <u>\$500.00</u>		
Installment Code: <u>24</u>		
Old Installment Amount: <u>\$100.00</u>		
New Installment Amount: <u>\$41.66</u>		

After you have completed above screens, press <F1> and SDA II will return you to Change Liquidation Schedule screen 1 of 1 with transaction status of "C" (completed).

**PMIS/JUMPS  
Affect**

This transaction updates the following in PMIS/JUMPS

- Segment 40 (for advance pay).
- Segment 41 (for advance BAH and OHA)
- Has no effect on the PMIS screens in the PMIS data base.

**Corrections  
and Deletions**

Corrections and Deletions may be done to this transaction and are done in Transaction Review of the SDA II System.

## Start/Resume Pay and Allowances (Cost Of Living Allowance) (P607), Continued

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**Fast Path ID  
and Data Entry,  
Continued**

When the above screen appears, enter “Y” on line beside COLA (Cost Of Living Allowances). Your screen should now look as follows:

Start Resume Pay and Allowances (Screen 1 of 2)		
000-00-0000 YN2 REILLY, MARTHA		
Stat	Options	Transactions
	<u>N</u>	Aviation Pay?
	<u>N</u>	Diving Duty Pay?
	<u>N</u>	Hardship Duty Pay-Location?
	<u>N</u>	Hostile Fire Pay (this month only)?
	<u>N</u>	Hostile Fire Pay (until further orders)?
	<u>N</u>	Tax Exclusion (this month only) Pay?
	<u>N</u>	Tax Exclusion (until further orders) Pay?
	<u>N</u>	Subsistence Pay?
	<u>Y</u>	COLA (Cost of Living Allowances)?

Now Press <F1>. The following screen 2 of 2 will appear. Press <F1> again

Start Resume Pay and Allowances (Screen 2 of 2)		
000-00-0000 YN2 REILLY, MARTHA		
Stat	Options	Transactions
	<u>N</u>	Career Sea Pay and Career Sea Pay Premium (if applicable)?
	<u>N</u>	Special Duty Assignment Pay?
	<u>N</u>	Responsibility Pay?
	<u>N</u>	Start BAH?
	<u>N</u>	Start/Change/Verify BHA Offset?
	<u>N</u>	Change Rental Charge for Inadequate Govt Qtrs?
	<u>N</u>	Flight Deck Hazardous Duty Pay?
	<u>N</u>	High Pressure Chamber Hazardous Duty Incentive Pay?

Press <F1> again. The next screen 1 of 1 “Cost Of Living Allowances” will display. Complete the fields.

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*Continued next page*

## Start/Resume Pay and Allowances (Cost Of Living Allowance), Continued

Fast Path ID  
and Data  
Entry,  
Continued

Complete the fields.

Cost Of Living Allowances (Screen 1 of 1)		
000-00-0000	YN2	REILLY, MARTHA
<p>Effective Date: <u>12/17/1997</u>    Effective Time: <u>0800</u>    Entry Type:</p> <p>Is this an OUTCONUS COLA with Dependents?:    <u>N</u></p> <p style="text-align: right;">           Number of COLA eligible Dependents:    <b>(Element code 48)</b>            Location Code:    <b>(Element code 49)</b> </p> <p style="text-align: right;">           Partial COLA or COLA W/O Dependents:    <b>(Element code 46)</b>            Partial COLA or COLA W/O Location Code:    <b>(Element code 47)</b> </p> <p style="text-align: right;">           Is this a INCONUS COLA?    <u>Y</u>            Is this a INCONUS COLA with dependents?    <u>Y</u>    <b>(Element code 90 w/deps 91 w/o deps)</b>            INCONUS COLA ZIP Code:    <u>66683</u> </p>		

Field	Action
Effective Date	Enter the day of the month the member becomes entitled to COLA.
Effective Time	Enter the effective time.
Entry Type	This field cannot be updated.
Is this an OUTCONUS COLA with Dependents?	Enter "Y" if starting OUTCONUS COLA with dependents. Leave at "N" for OUTCONUS COLA without dependents.
Number of COLA eligible Dependents	Enter the number of COLA eligible dependents (if applicable). Note: The maximum number of COLA eligible dependents is 6.
Location Code	Enter the Location Code. Press <F2> help wheel for list of codes.
Partial COLA or COLA W/O Dependents	Enter "P" for partial COLA or "W" if no dependents. If the member is entitled to Partial COLA enter "P" If member is entitled to COLA without dependents enter "W."

*Continued next page*



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**Section A**  
**GENERAL TRANSACTIONS**

## State Tax Information (L6EB), Continued

Fast Path ID and Data Entry, Continued	Field	Action
	State of Legal Residence	Enter the state of legal residence. Use the help wheel <F2> for a list of states. Or see Enclosure 9 of the Pay and Personnel Procedures manual. Leave blank for nonresident aliens, except where the member is terminating non-resident alien status.
	Enter 'E' If this is a taxing state that exempts	Enter "E" (exempt) if the member is a resident of a taxing state that exempts members from paying state taxes when not residing in state. <b>Refer to the "State Tax Listing" outlined in Chapter 8-B of the Pay and Personnel Procedures Manual.</b>

When you have completed screen 1 of 1 above, press <GO> or <F1>. The following screen 1 of 2 will appear. Begin completing the fields.

**This screen will not appear if the member is "exempt" from  
paying state taxes when residing in another state**

State Tax Information Screen (Screen 2 of 2)		
000-00-0000	BM1	DOE, JANE
Marital Status: <u>4</u>		
No. State Exemptions Claimed: <u>03</u>		
State Exemptions Claimed Amount: <u>    </u>		
Additional Withholding: <u>    </u>		

Field	Action
Marital Status	Enter the member's tax state marital status. Use the help wheel <F2> for a list of marital status codes. Leave blank for nonresident aliens.
No. State Exemptions Claimed	Enter the number of state exemptions claimed. Leave blank for nonresident aliens.
State Exemptions Claimed Amount	If applicable, enter the number of state exemptions claimed. Leave blank for nonresident aliens.
Additional Withholding	If applicable, enter the dollar amount of additional withholding (i.e., 030 =\$30). Leave blank for nonresident aliens.

When you have completed screen 1 of 2 above, press <GO> or <F1>. You will return to the SDA II main menu. Your transaction is complete.

**PMIS/JUMPS  
Effect**

The State Tax Information transaction updates the following in PMIS/JUMPS:

- Segment 66 and has no effect on the PMIS screens in the PMIS Data base.

**Corrections  
and Deletions**

Corrections and Deletions may not be made to this transaction.

**Section A**  
**General Transactions**

Item 14	Item 15	Item 16	Item 17	Item 18	Item 19
If city / Town of legal residence is located	State of Legal Residence is	State Marital Status	Exemptions Claimed is	Exemptions Claimed	State Exempt Status
In 1 of the 50 States including DC, PR, GU, VI, AQ.	CA, CT, ID, PA, MO, MT, NJ, NY, OR, VT	1,2,3,4, or 5 (Subject to Tax)	00-99	Blank	Blank
		Blank (Tax Exempt)	Blank	Blank	
	AZ (See Exhibit 11-AA)	1,2,3,4 or 5 Living in State	00-99	Blank	Blank
		Blank (living out of state, elects no withholding)	Blank	Blank	X
	MS	1,2,3,4 or 5	Blank	Dollar Amount	Blank
	AK, FL, IL MI, NV, NH PR, SD, TN, TX WA, WV, WY, AQ GU, VI	Blank	Blank	Blank	Blank
	AL, AR, CO DE, DC, GA, HI, IN, IA, KS, KY, LA, ME, MA, MD, MN, NC, ND, NE, NM, OH, HK, RI, CS, UT, VA, WI	1,2,3,4 OR 5	0-99	Blank	Blank
N/A	AQ, GU	Blank	Blank	Blank	Blank
Country of Legal Residence	00 (Alpha Code)	Blank	Blank	Blank	Blank
Blank	N/A	Blank	Blank	Blank	Blank

COMBINATION TABLE FOR PART III STATE TAX INFORMATION

## Section A General Transactions

- Item 14 City or Town of Legal Residence. Use this if the member is a U.S. Citizen or a resident alien, and is either  
(1) submitting his/her first CG-5225 to PMIS/JUMPS, or  
(2) changing legal residence or state income tax withholding information.

This should be blank for nonresident aliens, except where the member is terminating nonresident alien status on this form. If the member is a residents of Guam or American Samoa and does not have a city of legal residence, enter "NA" in this item. This item is limited to 24 characters.

- Item 15 State of Legal Residence. If item 14 is completed, also complete item 15. Enter the standard two-letter state abbreviation from Enclosure 10 to the 3PM. If Code "00" is used, enter the country of legal residence in item 14. Leave this item blank if the member is a nonresident alien, except where member is terminating nonresident alien status on this form.

Note: Leave item 16 thru 19 blank if the member is a nonresident alien, if the state of legal residence is not a taxing state, or if the state is not listed in Section B of Chapter 8 of the 3PM as having an agreement with the Coast Guard to withhold state income taxes.

Leave items 16 thru 18 blank if item 19 is completed.

- Item 16 State Marital Status: DO NOT enter "M" (Married) or "S" (Single). Enter one of the following codes

CODE	CONDITION
------	-----------

- |   |   |
|---|---|
| 1 | Member is single or married and elects to claim the "Single" rate on the state tax form, or the state form does not request marital status and the member is single.                      |
| 2 | Member has indicated "Single, Head of Household" on the state tax form.   |
| 3 | Member has indicated "Married and not claiming exemption for spouse" on the state tax form.   |
| 4 | Member has indicated "Married: or Married and claiming exemption for spouse and self" on the state tax form, or the state form does not request marital status and the member is married. |
| 5 | Member has indicated "Married and filing joint return" on the state tax form.   |

*Note: When item 16 is completed, either item 17 or 18, as appropriate, must also be completed*

- Item 17 Exemptions Claimed. The number of personal exemptions claimed using two digits. If the state form does not request the number of exemptions, enter "00". Leave this item blank if the state form uses a dollar amount exemption claimed; e.g., Mississippi.
- Item 18 Exemptions Claimed. The dollar amount of exemptions claimed for the state using five digits; e.g., 05000 for \$5000. Leave this item blank if the exemptions claimed are expressed in individuals rather than a dollar amount. This item is not for additional state income tax withholdings and cannot be used for such.
- Item 19 State Exempt Status. Use an "X" if the members state of legal residence is a taxing state, and has an agreement with the Coast Guard to withhold state income taxes, but exempts the member. Some states exempt a member from paying state taxes for reasons other than combat exclusion e.g. if the member is a legal resident of a state, but does not reside in that state, the member may be exempt from paying taxes. If item 19 is completed, items 14 and 15 are required.

**Section A**  
**GENERAL TRANSACTIONS**

## Federal Tax Information (L6EB), Continued

Data Entry Continued	Field	Action
	Tax Exempt Status	If the member is a U.S. citizen, resident alien, or nonresident alien (from Canada, Mexico, Puerto Rico ONLY), is eligible to claim an exemption from Federal withholding taxes, and so indicates the exemption on IRS form W-4, enter the last two digits of the calendar year in which the member signs that form. Otherwise leave blank.
	Terminate Status	If applicable, enter an "X" if the member is terminating nonresident alien status.
	Earned Income Credit	Members may request an advance of the EIC by completing IRS Form W-5. If W-5 item 1 is "YES" and item 3 is blank or "NO", enter MO in this field. If W-5 item 1 is "YES" and item 3 is "YES", enter MS in this field. If W-5 item 1 is blank or "NO", leave this field blank. <b>Note: This must be submitted after 1 January of the effective year. If a subsequent Federal Tax Information transaction is submitted for other purposes, this EIC field on the new transaction must contain MO or MS for advance EIC to continue.</b>
	Foreign Country of Legal Residence	This field is for non-resident aliens only. If the member is not a nonresident alien, your transaction is complete. If citizenship code entered is "N" enter the country of legal residence. Use the help wheel <F2> for a list of countries.
	Actual Marital Status	If citizenship code entered is "N", enter actual marital status. If tax-exempt status field is filled in with a date, Marital status must be left blank.

When you have completed screen 1 of 1 above, press <F1>. You will return to the SDA II main menu. Your transaction is complete.

**PMIS/JUMPS Effect**      The Federal Tax Information transaction updates the following in PMIS/JUMPS:

- Segment 64
- Has no effect on the PMIS screens in the PMIS Data base.

**Corrections and Deletions**      Corrections and Deletions may not be made to this transaction.

## Statement of Intent for Discharge, RELAD, Retirement (L6FB)

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<b>Purpose</b>	This transaction enables a member to declare intentions to RELAD, retire, or separate from service.
<b>Reference</b>	<ul style="list-style-type: none"><li>• CG Personnel &amp; Pay Procedures Manual, HRSICINST M1000.2 (series), Chapter 3</li><li>• CG Pay Manual, COMDINST M7220.29, Chapter 10</li><li>• Joint Federal Travel Regulations (JFTR)</li></ul>
<b>Transaction Built in SDA II</b>	Statement of Intent Discharge, RELAD, Retirement
<b>PMIS Transaction</b>	L6FB
<b>Policies and Procedures</b>	<p>Information you need to know about this transaction:</p> <ul style="list-style-type: none"><li>• PMIS/JUMPS generates a monthly Statement of Intent Report that is forwarded to the appropriate PERSRU's for action. This report is sorted by Reporting Unit and OPFAC and lists all members whose active duty obligation (enlisted) or termination date (officer) falls in the third calendar month after the current month. A SOI report may also be generated at the PERSRU for individuals in the database from the Local Report Menu (Fastpath: locrmenu).</li></ul> <p>The date shown on the report under EXP OF ENL/TERM DATE is either the EXP-AD-TERM or SEP-DT-EXT as it appears on segment 00 (or page 1) of the member's JUMPS file. The date shown under DATE OF EFFECTIVE SOI ON FILE is the preparation date of the most recent SOI submitted to PMIS/JUMPS with an effective date prior to the date of the report. <u>This SOI may not be applicable to the status change that will occur on the EXP OF ENL/TERM DATE shown on the report.</u> Another SOI submission may be required depending on the member's current status.</p> <ul style="list-style-type: none"><li>• <b>Submit this transaction at least 45 days prior to one of the following events:</b><ul style="list-style-type: none"><li>* Departure on terminal leave in connection with RELAD, expiration of enlistment or period of active duty.</li><li>* Reserve on EAD being discharged to enlist on active duty.</li></ul></li><li>• <b>Submit this transaction at least 60 days prior to:</b><ul style="list-style-type: none"><li>* Retirement.</li><li>* Departure on terminal leave in connection with retirement.</li></ul></li></ul>

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*Continued on next page*

## Statement of Intent for Discharge, RELAD, Retirement (L6FB), Continued

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**Policies and Procedures, Continued**

- **Do not Submit** this transaction in the following cases:
  - \* A member in a nonpay status who is involuntarily retained (i.e., members in military confinement or in an appellate leave status).
  - \* Immediate or priority discharges (submit SOI E-mail per section 3-B of the Pay and Personnel Procedures Manual).
  - \* Temporary or permanent disability retirements (submit SOI E-mail per section 3-B of the Pay and Personnel Procedures Manual).
  - \* Enlisted members being promoted to warrant officer.
  - \* Warrant Officers being promoted to Lieutenant.
  - \* Members in military confinement whose enlistment expires.
  - \* Members on appellate leave whose enlistment expires.
  - \* Members retained within 10 days of their expiration of enlistment (in these cases, notify HRSIC (SES) immediately by urgent email correspondence); and reenlistments, extensions/re-extensions of enlistment, where there is no SRB entitlement, and where the member's separation date has already been set by P154, P159, or P191 transaction submission.
- If the member's intentions, or any information on this transaction, changes following submission, resubmission with a new effective date is required. **In addition, immediately notify HRSIC (SES) by urgent email correspondence if the member's intentions change within 10 days of the impending separation/retirement date.**

**Fast Path ID and Data Entry**

If not creating this transaction in an event, enter "soisep" for Fast Path ID or press "ACA" from the Main Menu Screen in SDA II. Then enter the member's SSN or last name and press <F1>. Then press <F1> again. The following screen 1 of 4\* will appear.

Discharge, RELAD, or Retirement (Screen 1 of 4*)		
000-00-0000	FT2	KIRK, JAMES
Effective Date: <u>02/23/1998</u>		
Effective Separation Date: <u>06/30/1998</u>		
Termination Type: <u>A</u>		Officer or enlisted discharge
Separation Under Honorable Conditions: <u>Y</u>		
Leave Data as of End Month Compute: 01/20/1998		
Balance: 34.0	Cumulative Sold: 37	Saved Balance: 0.0
Days of Saved Leave to Sell: <u>0.0</u>		
Days of Regular Leave to Sell: <u>23.0</u>		
Annual Leave to be Taken Prior to Event: <u>11</u>		
Total Leave Disposed of: <u>34.0</u>		

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*Continued on next page*

**Section A**  
**GENERAL TRANSACTIONS**

## Statement of Intent for Discharge, RELAD, Retirement (L6FB), Continued

**Fast Path ID  
and Data  
Entry,  
Continued**

Field	Action
Effective Date	Enter the date this transaction is being prepared.
Effective Separation Date	Enter the member's date of RELAD, Retirement, or Discharge. This is the last day of active duty.
Termination Type	Enter the termination type code. Use the help wheel <F2> for a list of codes.
Separation Under Honorable Conditions	Enter 'Y' (yes) or 'N' (no) whether or not the member is being separated under honorable conditions.
Leave Data as of End Month Compute	This is the latest PMIS/JUMPS end of month compute that has processed in SDA II on the member. This field is not updateable by the user.
Balance	The member's current leave balance. This field is not updateable by the user.
Cumulative Sold	This field shows the total amount of leave the member has sold in his/her career. This field is not updateable by the user.
Saved Leave Balance	If the member has saved leave balance, this field will show the total amount. This field is not updateable by the user.
Days of Saved Leave to Sell	Enter the number of Saved Leave the member will sell.
Days of Regular Leave to Sell	Enter the number of Regular Leave the member will sell.
Annual Leave to be Taken Prior to Event	Enter the number of days leave the member will take/use prior to the Discharge, RELAD, or Retirement. <b>Note: Enter last period of leave first, followed by next to last period, etc. HRSIC (SES) can only view first two entries in PMIS/JUMPS. If more than two periods are entered send E-Mail to HRSIC/SES in addition to submitting this SOI transaction.</b>
Total Leave Disposed of	SDA II will automatically calculate the total amount of leave disposed of from the information entered above.

When you have completed screen 1 of 4\* above, press <F1>. Screen 2 of 4\* will appear. Begin completing the fields.

**Note: If 0 (zero days) was entered in "Annual Leave to be Taken Prior to Event" field above, then screen 2 of 4\* will not appear. SDA II will go directly to screen 3 of 4\* instead.**

Discharge, RELAD, or Retirement (Screen 2 of 4*)			
000-00-0000	FT2	KIRK, JAMES	
Annual Leave to be Taken Prior to Event: <u>11.0</u>			
Annual Leave to be Taken Prior to Separation:			
Leave Type: <u>AI</u>	Inconus	From: <u>06/20/1998</u>	To: <u>06/30/1998</u>
—		/ /	/ /
—		/ /	/ /
—		/ /	/ /
Running Total of Leave Taken: <u>11</u>			

*Continued on next page*



## Clothing and Small Stores Checkage (L6KB), Continued

**Fast Path ID  
and Data Entry,  
Continued**

Clothing and Small Stores Checkage (Screen 3 of 3)  
Are the records on Screen 2 ready to be transmitted?: Y

Field	Action
Are the records on Screen 2 ready to be transmitted?	If you <u>will be approving</u> the transaction(s) on page 2 of 3* enter "Y" (yes). If you will not be approving the transaction(s) on page 2 of 3* leave at "N" (no).

When you have completed screen 3 of 3, press <GO> or <F1>. You will return to the SDA II main menu. Your transaction is complete.

**PMIS/JUMPS  
Effect**

The Clothing and Small Stores Checkage transaction updates the following in PMIS/JUMPS:

- Segment 38
- Has no effect on the PMIS screens in the PMIS data base.

**Corrections  
and Deletions**

Corrections and Deletions may be made to this transaction and are done in Transaction Review of the SDA II system.

Note: A correction or deletion will only process if it matches and indebtedness segment 38 that has a "blank" in the Compute flag. If the segment 38 has a "4" in the Compute flag, refunds must be processed using the Miscellaneous Credit to Member's Account (H604) transaction.

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**Section A**  
**GENERAL TRANSACTIONS**

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## Member's Locally Created Data, Continued

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**Fast Path ID  
and Data  
Entry,  
Continued**

Field	Action
Expected Good Conduct Date	Enter the member's next expected Good Conduct Award date. This field for enlisted members only. <b>Note:</b> Refer to section 17-A-20 of this manual for instructions on how to get an adhoc/goodcon.r (Good Conduct Award report) in SDA II.
Sea Pay Premium	Enter the expected Sea Pay Premium Date.
Maximum Allowable Weight	Enter the member's maximum allowable weight (not the current weight of the member).
Home Phone Number	Enter the member's home phone number.
Work Phone Number	Enter the member's work phone number.
Comments	Enter comments (if necessary).

When you have completed entering the information in screen 1 of 1 above press <F1>. You will return to the SDA II main menu. Your transaction is complete.

**PMIS/JUMPS  
Effect**

This transaction has no affect on PMIS/JUMPS.

**Corrections  
and Deletions**

Corrections and Deletions may not be made to this transaction.

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## **Homeport Change for Coast Guard Cutters**

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**Introduction**      The information in this guide has been provided to assist the PERSRU on what action to take when a cutter changes homeport.

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**In this guide**      The following topics will be discussed in this guide:

<b>Topic</b>	<b>See Page</b>
Member Electronic Files	2-A-285
SDA II Transactions	2-A-286
Change in BAH Transaction (P606)	2-A-286
Change in Mailing Address (L6EB)	2-A-286
Start/Resume Pay and Allowances, CONUS COLA (P607)	2-A-286
Start/Resume Pay and Allowances, (P607) and Stop Pay and Allowances (P625), Subsistence Pay	2-A-287
Leave (L63B)	2-A-287
Change in Dependency/Emergency Data SGLI (CG-4170A)	2-A-288
Payment Option Election (L6GB)	2-A-288
Change Allotment Address (P800)	2-A-288

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**Section A**  
**GENERAL TRANSACTIONS**

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## Homeport Change for Coast Guard Cutters Continued

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**Member Electronic Files**      The Following steps must take place to ensure that the electronic files are transferred from Sending PERSRU to Receiving PERSRU:

<b>Prior to PERSRU Change</b>	<b>Step</b>	<b>Who Does it</b>	<b>Action to be taken</b>
	1	HQ	Approves the change of servicing PERSRU for cutter(s)
	2	Sending PERSRU	An e-mail must be sent to HRSIC-UNITFILE (copy to Receiving PERSRU and HRSIC-MAS) requesting that the unit file to be changed to show the new servicing PERSRU for the unit. <b>Refer to step 2 on page 5-2 of the SDAII user Manual on what information should be in the e-mail.</b>
	3	HRSIC	Once the e-mail request is received, the unit file will be changed to show that Receiving PERSRU is now the servicing PERSRU.
<b>On the Day of the PERSRU Change</b>	4	Sending PERSRU	Run a Unit Roster out of the SDAII system and see if there are any members that should not be assigned to this unit. If there are members on the roster that should not be, you do not want to create D100s; notify HRSIC-MAS who should not be in your database.
	5		Complete Admin Change of servicing PERSRU for a Unit (D100) event in SDA II. Refer to page 5-2 of the SDAII user Manual to complete this event. <ul style="list-style-type: none"><li>This Event will produce a D100 on every member that is assigned to the unit. This D100 will update PMIS/JUMPS to show the new servicing PERSRU as Receiving PERSRU</li></ul>
	6		Once the Admin Change of Servicing PERSRU for a Unit (D100) event has been completed, check Review and Approval in SDAII to ensure that there was a D100 completed on every member assigned to the unit.
	7		Call the PERSRU to let them know that the database will be updated after polling that day.

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**Section A**  
**GENERAL TRANSACTIONS**

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## **Homeport Change for Coast Guard Cutters, Continued**

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**SDA II  
Transactions**

The following SDA II transactions will be completed on each member:

- Change in BAH Transaction (P606)
  - Change in Mailing address (L6EB)
  - Start/Resume Pay and Allowances, CONUS/OUTCONUS COLA (P607)
  - Start/Resume Pay and Allowances, Substances Pay (P607)
  - Stop Pay and Allowances, Subsistence Pay (P625)
  - Leave (L63B)
  - Change in Dependency/Emergency Data/SGLI (CG-4170A)
  - Payment Option Election (POE, L6GB)
  - Change Allotment Address (P800)
- 

**Change in  
BAH  
Transaction  
(P606)**

You will want to create this transaction, if you are wanting to change the zip code on the member's who are entitled to BAH With or BAH W/O. The Change in BAH transaction will **not** have to be completed for member's who do not wish to move their dependents.

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**Change in  
Mailing  
Address  
(L6EB)**

This transaction will have to be completed if the member's mailing address changes due to the homeport. Do not create this transaction for member whose mailing address does not change (i.e., dependents who aren't relocating and/or the member wants to keep his/her current/former mailing address.)

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**Start/Resume  
Pay and  
Allowances,  
CONUS  
COLA (P607)**

You will want to create this transaction, if wanting to change the zip code on member's assigned to the unit.

Note (1): There is no need to do a stop transaction (P625) for the old CONUS COLA zip code. The Start/Resume Pay and Allowances transaction (P607) will automatically shut down the old segment in PMIS/JUMPS.

Note (2): For those members who are not changing zip codes for BAH, CONUS COLA the zip code will remain the same as well.

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*Continued on next page*

## Homeport Change for Coast Guard Cutters, Continued

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**Start/Resume  
Pay and  
Allowances  
(P607 and Stop  
Pay and  
Allowances  
(P625),  
Subsistence Pay**

Those enlisted members who are entitled to travel time and proceed time will be entitled to SEPRATS-T during this type of delay. This delay will probably not happen until the ship arrives to the new homeport. Use the following procedures for paying the member SEPRATS-T, since there will be no departing and reporting transactions submitted to pay this entitlement:

- On the day prior to the member starting his/her delay (this could be the last day the member is being charged leave if on leave during delay), a P625 will have to be completed to stop PARTIAL BAS. The time of this transaction must be 1900 or later.
- On the day the member starts his/her delay, (this could be the day after the member was charged leave if on leave during delay, a P607 will have to be completed to start SEPRATS. The time of this transaction must be 0500 or earlier.
- On the day prior to the member returning from his/her delay, a P625 will have to be completed to stop SEPRATS. The time of this transaction must be 1900 or later.
- On the day the member returns from his/her delay, a P607 will have to be completed to start Partial BAS. The time of this transaction must be 0500 or earlier.

**Note:** Do not conflict these dates with a member who is taking leave in conjunction with travel and proceed time. The leave transaction will pay the member SEPRATS-T for the inclusive dates of leave.

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**Leave (L63B)**

A leave transaction will have to be submitted if the member is requesting to take leave during his/her delay to move the dependents from old homeport to new homeport.

**Note:** Refer to 'Start/Resume Pay and Allowances (P607) and Stop Pay and Allowances (P625)' and prior page of this guide to ensure that the leave transaction does not conflict with any other subsistence transactions.

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*Continued on next page*

**Section A**  
**GENERAL TRANSACTIONS**

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## **Homeport Change for Coast Guard Cutters, Continued**

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**Change in  
Dependency/  
Emergency  
Data SGLI  
(CG-4170A)**

An update to the Emergency Data information on the CG-4170A will have to be completed in cases where the member or member's dependents home address changes.

Note: Make sure the 'Effective BAH Date' is left blank on this transaction if only updating emergency data information. There is no need to send this transaction to HRSIC if only updating emergency data information.

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**Payment  
Option  
Election  
(L6GB)**

This transaction will need to be completed if the member is requesting to change his/her payment option due to the homeport change.

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**Change  
Allotment  
Address (P800)**

This transaction will need to be completed if the member is requesting to change an allotment address due to the homeport change. In most cases, this will probably be an address change for BONDS.

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